TRUSTED RISK ADVISOR™

CERTIFICATION PROGRAM

CONSULTING...DIAGNOSING...PROTECTING

BEYOND INSURANCE

PROFESSIONAL INSURANCE AGENTS PIA

ABOUT THE CERTIFICATION PROGRAM

The Trusted Risk Advisor™ certification from Beyond Insurance is a symbol of professional excellence in consultative, diagnostic sales and mastery of risk advisory knowledge. By obtaining the Trusted Risk Advisor™ certification, you will differentiate yourself with insureds, carriers, centers of influence, and your community through the quality of education, knowledge, and diagnostic process you possess.

The engaging program offers training and coaching in consultative and diagnostic sales using a 5-step enterprise risk management platform.

KEY BENEFITS OF THE TRA PROGRAM

COMPETITIVE ADVANTAGE

Formal training in consultative, diagnostic sales and risk advisory skills gives you a distinguished brand and competitive advantage in the marketplace.

CERTIFICATION

Demonstrates that you have the risk advisory knowledge, skills, tools, and process needed to successfully identify, analyze,
and mitigate risks and exposures on your client's behalf.

PERFORMANCE

Trusted Risk Advisors™ build high-trust client relationships that are strong and enduring, regardless of the market. The TRA mark demonstrates that you are skilled at reducing claim frequency and severity.

WHO SHOULD ATTEND?

This program is designed for seasoned and successful agents and brokers who want to take their game to the next level — to reap the rewards that only credibility, trust, and enhanced perception can bring. Although at least two years of industry experience is recommended, consideration will be given to professional experience outside the industry.

To earn the certification, you must complete all four sessions of the Trusted Risk Advisor™ program in order. Agents who complete the Trusted Risk Advisor™ program are granted a lifetime certification.

The collaborative, digital learning platform will empower you to master the methods of thinking like a risk advisor in just 30-45 minutes a day over one week.

- Access the course anywhere, any time on any device.
- Interact online with a community of peers and experts in robust discussion groups.
- Enhance your learning through expert videos, case studies, articles, and thought-provoking exercises.

About the TRA Program

GOODBYE, AGENT AND BROKER. HELLO, TRUSTED RISK ADVISOR™

- Discover Your WHY...Your Purpose for Existence
- Your Path to Trusted Risk Advisor Status
- Differentiation, Commoditization, and the Traps
- Developing a Unique Message – Your TRA Value Proposition
- Risk, Risk Management, and the TRA Decision Matrix

TRA 1

THE ART AND SCIENCE OF DISCOVERY...LEADING TO STRATEGY

- The I[3] System
- The Five Stages in the Initial Prospect Interview
- Walk Away Power
- The Employee Interview... a Strategy to Position You as the Undercover Boss!
- Case Study: Hospitality Industry
- The TRA Prospect Trigger...Emotion
- Active Listening
- The Prospect Qualification Filter

TRA 2

THE RISK ADVISOR – MOVING AWAY FROM THE TRANSACTIONAL SALE

- The Underwriter's Response to the TRA Process
- The Art of Negotiation
- Prospect Research Evaluation Program (PREP)
- Filling the Prospect Pipeline
- The World of the CFO

TRA 3

CREATING A DIFFERENTIATED CUSTOMER EXPERIENCE JOURNEY THROUGH THE TRA PROCESS

- The Customer Experience Journey
- Monitoring Risk and Risk Management within the TRA Framework
- Building Relationships that Last
- Creativity and
- Innovation...the One-Two Punch of the TRA
- The Art of Goal-Setting
- Living Each Day as a Servant Leader!

TRA 4